Building Economic Sustainability Through Tourism Project

WELLNESS IS IN OUR NATURE

AN ASSESSMENT OF JORDAN'S WELLNESS TOURISM POTENTIAL

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ACRONYMS

ASEZA	Aqaba Special Economic Zone Authority
BDS	Business Development Service
CBO	Community-Based Organization
COM	Council of Ministers
DCA	Development Credit Authority
DOA	Department of Antiquities
GAM	Greater Amman Municipality
HRDC	Human Resource Development Corporation
IBLAW	International Business Legal Advisors
ILO	International Labor Organization
IR	Intermediate Result
IT	Information Technology
JHTEC	Jordan Hospitality and Tourism Education Company
JITOA	Jordan Inbound Tour Operators Association
JOHUD	Jordan Hashemite Fund for Human Development
JRA	Jordan Restaurant Association
JRF	Jordan River Foundation
JTB	Jordan Tourism Board
MFI	Micro-Finance Institution
MOL	Ministry of Labor
MOU	Memorandum of Understanding
MOTA	Ministry of Tourism and Antiquities
MTA	Madaba Tourism Association
NGO	Non-Governmental Organization
NTS	National Tourism Strategy
NTVS	National Tourism Visitors Survey
PDG	Program Development Grant
PSP	Private Sector Participation
RFP	Request for Proposal
RSCN	Royal Society for the Conservation of Nature
SME	Small and Medium Enterprises
SSC	Strategy Steering Committee
TDC	Tourism Development Corporation
TOR	Terms of Reference
UNESCO	United Nations Educational, Scientific, and Cultural Organization
USAID	United States Agency for International Development
VTC	Vocational Training Center

MANAGEMENT SUMMARY

The global wellness industry is a thriving and fast growth sector, and one of its healthiest components is wellness tourism. The global wellness tourism industry is currently valued at nearly USD 700 billion with an annual growth rate expected to be close to 7.5%. In addition to this, wellness tourists are seen as high value tourists who see the value in paying for activities that promote their sense of wellbeing.

While the MENA region is currently the smallest globally as a wellness destination, it is growing at a faster rate than the rest of world at an annual rate of approximately 14%. While the majority of this growth is driven by the GCC countries through investment in the Spa economy, wellness travelers are generally considered people who are seekers of authentic and local experiences, and this is where the Jordan has a significant advantage.

This assessment points to the fact that Jordan is uniquely suited to developing a wellness tourism positioning and using it as one of the ways to drive growth in both value and volume of its tourism.
The title of this report is more than marketing hyperbole in the case of Jordan, because wellness is quite literally in the nature of the country.

With that in mind, wellness tourism for Jordan can be defined as follows:
The promotion of non-medical treatments, activities and a lifestyle that is conducive to better state of wellbeing. These can relate to specific ailments or for the general purpose of feeling good about one's body, mind and spirit.
It is important to also highlight, that this is in line with the expectations of a new generation of travelers that put their wellbeing high on the list of criteria for choosing a destination.

The main requirements for driving wellness tourism in Jordan are as follows:
- Drive Volume: Increase the number of visitors both international and domestic by driving awareness of Jordan's main wellness attractions, products and services.
- Drive Value: Increase the spend per visitor, by highlighting the opportunities on a visitor's journey where wellness can be a value added option.

The 5 potential drivers of wellness tourism can be summarized by the following:
- THE DEAD SEA SPA ECONOMY
- NATURAL THERMAL/ MINERAL SPRINGS
- ADDING VALUE TO ECO/ ADVENTURE/ SPIRITUAL/ CULINARY BY ADDING WELLNESS ACTIVITIES AND PRODUCTS
- DOMESTIC WELLNESS TOURISM NOT ONLY SERVES AS A MEANS TO DRIVE TOURISM REVENUES, BUT ALSO AS A WAY TO PROMOTE DOMESTIC WELLNESS IN GENERAL.
- NATURAL REHABILITATION FROM MEDICAL PROCEDURES[1]

The key criteria that should be used in assessing the opportunities are as follows:
1. Availability of infrastructure and resources
2. Readiness for delivery of product and services (including skill availability)
3. Investment requirements
4. Credibility within the narrative of wellness
5. Authenticity of the product/ service or experience in the context of Jordan

[1] Medical tourism is being highlighted in the context of Wellness tourism as a potential long-term opportunity to consider once the strategy for wellness tourism is established.

KEY CONCLUSIONS:

- Creating a team that will drive this sector independent of medical tourism is key to its success.
- Garnering support and acceptance of the definition of wellness outlined here will be key to any next step in this process.
- Given the climate, the broad array of wellbeing-oriented activities, locations, food culture and easily recognizable authenticity, Jordan has a lot of credentials to support the development of a wellness tourism strategy.
- Prioritizing short term opportunities will likely galvanize the sector and show quick returns.
- Focussing on the 'natural' aspects of wellness will give Jordan a unique positioning, particularly as it pertains to the region. These range from utilizing natural products for beauty treatments (salts, mud, olive oil etc.), locally farmed foods prepared in healthy manner, time in nature (regardless of whether it's the desert, the sea or forests in the North).
- Combining the benefits of the Dead Sea with other wellness activities, products and services will also serve to make this a unique proposition. This can translate into activities such as day hikes ending at a Dead Sea resort, mindfulness or self-development retreats at or around the Dead Sea, treatment for depression and other mental ailments, etc.
- Building awareness and knowledge has to be a key component of any strategy moving forward.
- There are 3 main opportunity areas for developing wellness tourism in Jordan are as follows:
    - Infrastructure based wellness, principally the Dead Sea, spas and thermal springs/ bath.
    - Wellness as a complimentary addition to general tourism activities as a means of attracting new tourists as well as increasing the value of existing visitors.
    - As a longer-term opportunity, wellness as part of medical tourism, focussing on aiding recovery from any medical procedures should also be considered.

INTRODUCTION

DEFINING WELLNESS AND WELLNESS TOURISM

The idea of wellness and wellness related activities have been around as long as human beings have been around, and like everything else in our collective history, it ebbed and flowed in the context of the prevailing circumstances. In more recent memory, the late eighties and nineties witness a surge in outward and aesthetic related wellness activities that came as a reaction to the surge of obesity that started in the 70ies driven by the emergence of fast food and 'convenient' lifestyles. The diet and exercise craze are how wellness manifested itself in then, and there are more than a few remnants of it visible today. It gave birth to numerous industries or at least catalyzed their growth, industries such as plastic surgery, weight loss retreats, fad diets and the often-misguided world of weight loss products.

On the fringes of this wave of wellness related behaviors were people who were already thinking about it differently, still motivated at least partly by outward aesthetics, they were also looking on the inside as a means of achieving beauty on the outside. Those were the ripples that created the current wellness tsunami, the practice of yoga, meditation, natural living, a connection to nature, avoidance of modern medicines, rediscovering the roots of food, the birth of 'organic' life un-spoilt by man-made poisons or an obsession to control or speed up nature. For a couple of decades, this was more of a fringe movement than anything else, then came the new millennium, and the anticipated havoc of the Y2K bug brought the digital age into mass consciousness and a recognition of our reliance on technology in our everyday life. With that the world wide web spread rapidly, birthing an array of products and services created to make our lives easier, more convenient and nearly ensuring we never needed to leave our desks for anything. Being always connected became desirable, as did the latest gadgets, and the promise of rapid financial success through digital scaling seemed within everyone's reach. Within less than a decade, the corporate landscape was turned on its head, web-based companies no one had heard about suddenly dominated the stock market, the digital bubble that burst early in the new millennium was quickly forgotten, and rapid growth was an expectation every corporation had to meet continuously.

Then	Now
• Wellness was most closely associated with travel for specific medical conditions or ailments. • It was typically in highly controlled environments that were directed by the host institution (think fat farms, regulated health spas, hospitals etc.). • It was outcome oriented, and less holistic and experiential in terms of approach. • It was seen as 'problem solving'. • It was a one size fits all approach.	• Wellness and wellbeing are seen as synonymous and holistic. • Well informed travelers want to be able to curate their wellness experiences. • Its seen as part of a broader journey rather than outcome oriented. • It is expected to be an enriching experience, and part of a broader set of 'beliefs'. • Its part of one's continued self development efforts rather than oriented towards a specific problem. Its an investment in oneself. • Its seen as unique and tailor made to individual preference and tastes.

Table 1: comparison of wellness perceptions – multiple sources

The side effects of the fast pace of life, driven by technology and financial insecurity has been stress on people's physical and mental health. This newly found insecurity, coupled with a digital exhaustion and the stress of making ends meet has given birth to this new wave of wellness pursuit.

Wellness today can be defined as **the pursuit of activities, products and services that help people achieve a sense of physical, emotional, intellectual, spiritual, social, financial and environmental wellbeing**. Wellness today is a holistic concept, underlined by the idea of mindfulness, simply expressed, a more attentive way of living where one considers the impact of themselves on their surroundings as well as the impact of those surroundings on them, and recognizes the interdependence on one another.

In this context, **wellness tourism is a natural bi-product of this evolution in wellness**. If one is practicing a mindful approach to living, it's no longer an analogue way of being, but rather a constant pursuit which doesn't end at the airport check in counter. Enabled by the ease and affordability of travel, and global curiosity, the tourism industry has surged, and with-it wellness minded traveler.

Whether it's for the single-minded pursuit of wellness or maintaining a mindful approach in the pursuit of other activities, wellness tourism is on the rise, delivering a traveler willing to spend their money on activities, products and services they see as an investment in themselves.

The following are some key characteristics of wellness seekers:

- Self-development and continuous growth are points of pride and a represent new milestones of success.
- Money spent on wellness is an investment in oneself, it's something you keep and never discard, and in a world with little other means of security, it's considered a secure investment.
- Giving is more rewarding than getting.
- Being inspired and inspiring others is priceless, and a strong driver of positive change.

Figure 1: Wellness wheel.
Source The Coaches Institute Training Manual

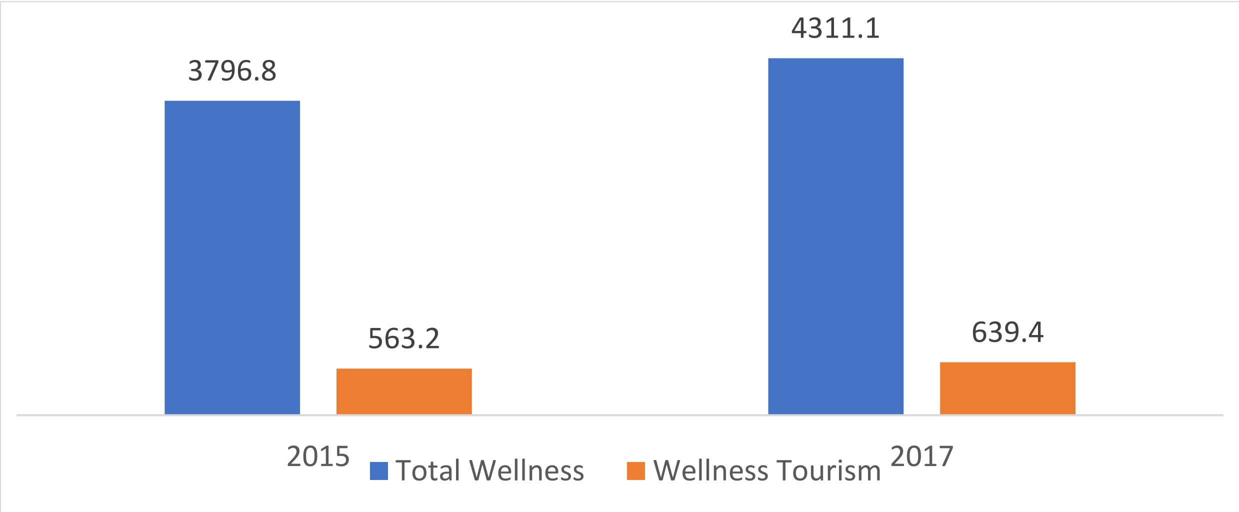
KEY GLOBAL TRENDS IN WELLNESS AND WELLNESS TOURISM:

1. Non-generic wellness:
   - Customized meditation – meditation for different impact – relaxing, energy, focus, creativity etc.
   - Individualized self-development through learning and participation opportunities
2. Intimate with food:
   - Mindful eating
   - Food as human and cultural ritual
   - Food as social connector
   - Food as a sensorial experience beyond just taste
3. Nature as Medicine:
   - Prescribing time in nature in the same way medicine is prescribed
   - Itineraries including time out of urban spaces experiencing nature
4. Art, music, culture and dance as prescriptions:
   - In the UK and Canada, doctors have or will soon start to prescribe therapeutic art- or hobby-based treatments for ailments ranging from dementia to psychosis, lung conditions and mental health issues. (Smithsonian Magazine: Nov 8, 2018)
5. Itineraries including Active Recovery:
   - Recovery as an active state rather than a passive state
   - More frequent active rest periods, rather than fewer long one
   - Utilizing things like the following for low cost frequent active recovery:
     - Cryotherapy
     - Pulse Electro Magnetic Field Therapy
     - Flotation Therapy
     - Sleeping Pods
     - Breathing pods
     - Energy Lounges
     - Music Therapy
     - Art Therapy
     - Alternative medicine techniques
     - Natural therapies
     - FAR-Infrared Sauna
     - Water Massage
     - Lymphatic Bed massage
     - Solariums for natural light

6. Wellness for the 99%
    - To a large extent wellness has been the domain of the affluent and well off.
    - In order for it to be considered truly global and impactful, innovations that make it financially accessible is required
    - The development is in line with the fashion and cosmetic industries that have both found ways to democratize high end products.
7. The well-traveled, travel well
    - Millennials and gen z-ers take their wellbeing practices with them everywhere they go.
    - These are two generations raised with a significantly higher awareness and belief in personal wellness.
    - They expect to find the product and services they use everywhere they go, because their technology is with them everywhere they go.

THE GLOBAL WELLNESS TOURISM INDUSTRY

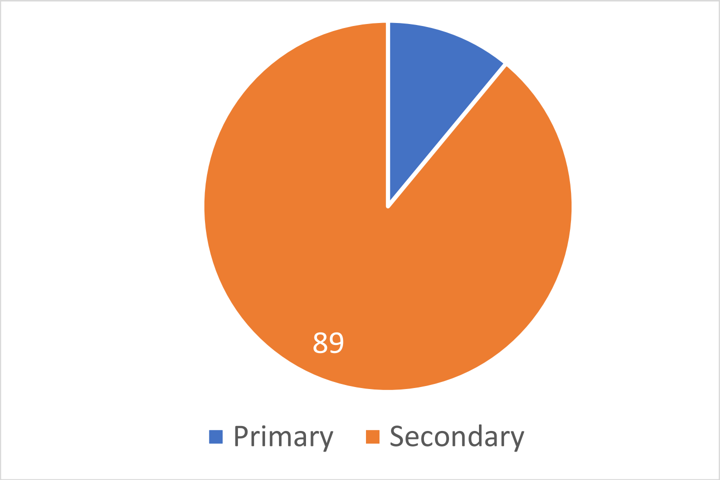
To say the global wellness tourism industry has been a story of success would be a gross understatement. A healthy 6.5% year on year growth puts global earnings at over half a trillion dollars, and this growth is expected to accelerate to 7.5% to put the industry at a near trillion dollars in the next 3 years.



Billions of USD
Graph 1: Value of Wellness and wellness tourism industry
Source: Global Wellness Institute

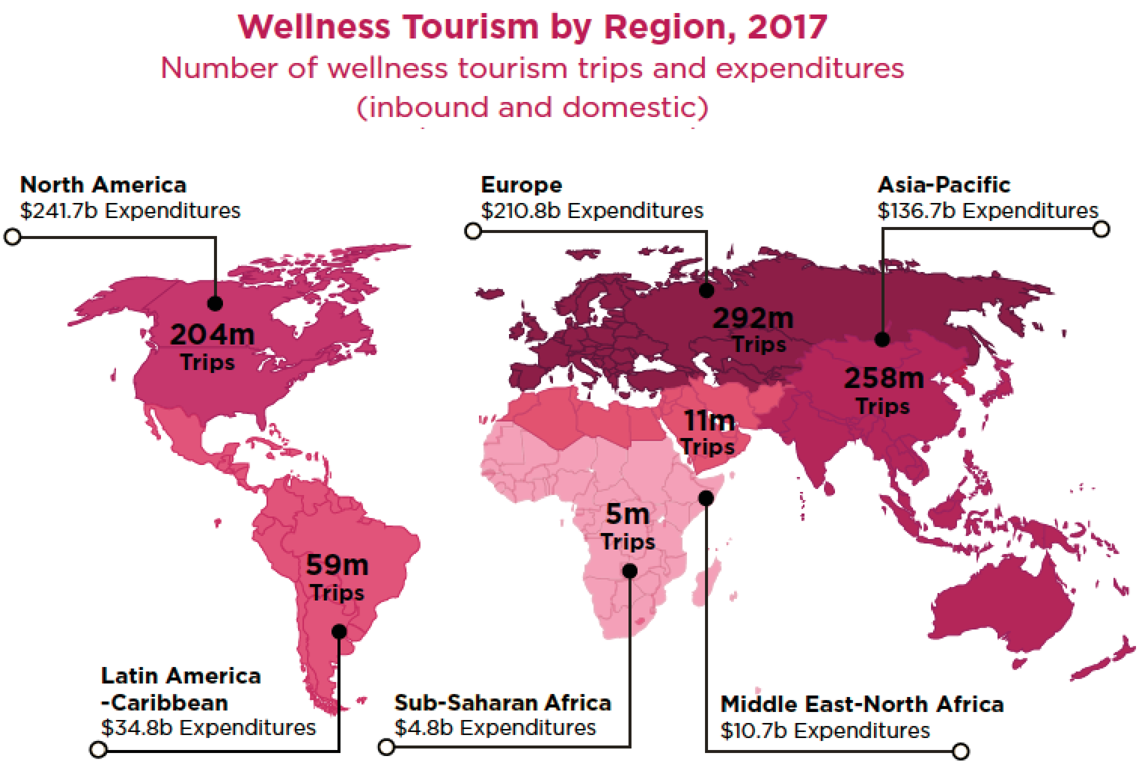
The Global Wellness Institute divides wellness travelers into two types, primary and secondary travelers, and defines them as follows:

- Primary wellness travelers: Those who are mainly motivated by wellness to take a trip or choose a destination. These account for 11% of the total industry.
- Secondary wellness travelers: those who seek to maintain wellness or engage in wellness activities during travel. These account for 89% of the total industry, highlighting the fact that this is no longer a niche subset of travelers.
- That said, international wellness travelers tend to outspend their counterparts by 53% on average, while domestic wellness tourists tend to outspend their counterparts by a whopping 178%, making both groups a high value group of travelers. (Source: Global Wellness Institute)



Graph 2: Ratio of primary to secondary wellness travelers
Source Global Wellness Institute

While the industry is primarily driven by western tourists and destinations, all markets are experiencing exponential growth, with the Asia-Pacific, the Middle East, Africa and Latin America quickly scaling up.



Map 1: Wellness Tourism trips and spent by region
Source: Global Wellness Institute

The exciting statistic from the Middle East is that is second only to North America when it comes to per capita expenditure on wellness tourism.

Whilst accounted for separately, and likely has some overlap with wellness tourism, one cannot discuss wellness tourism without mentioning the spa economy and thermal/mineral springs industry.

Figure 2: The global spa economy
Source: Global Wellness Institute

The USD119 Billion-dollar spa economy principally derives its income from spa facilities world-wide, though its sub-sectors are also growing rapidly. The thermal/mineral spring industry on the other had derives higher revenues and better margins from destinations with spa services than without. In the context of Jordan (more on this later), it is key to keep these figures in mind as we seek to develop this opportunity area.

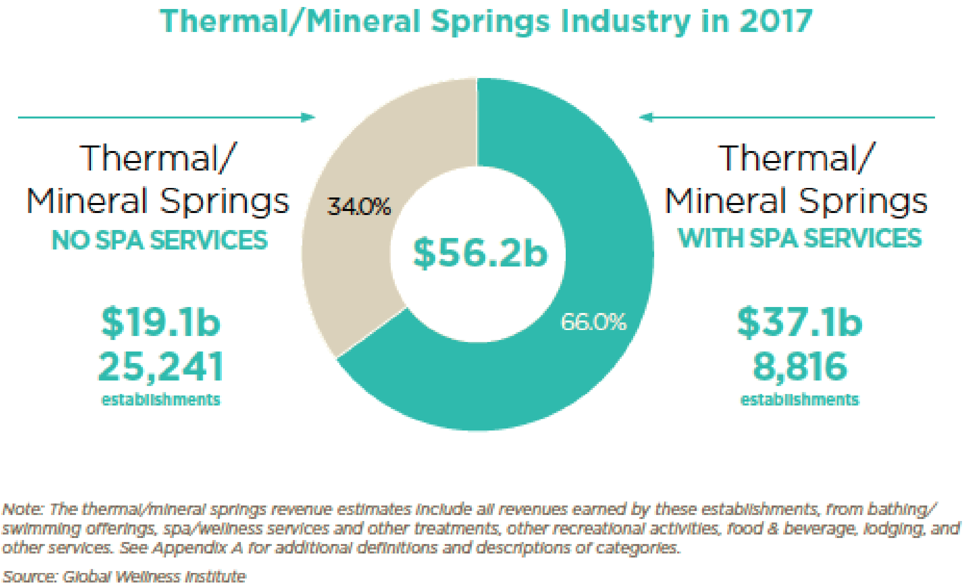


Figure 3: Global Thermal and Mineral Spring industry
Source: Global Wellness Institute

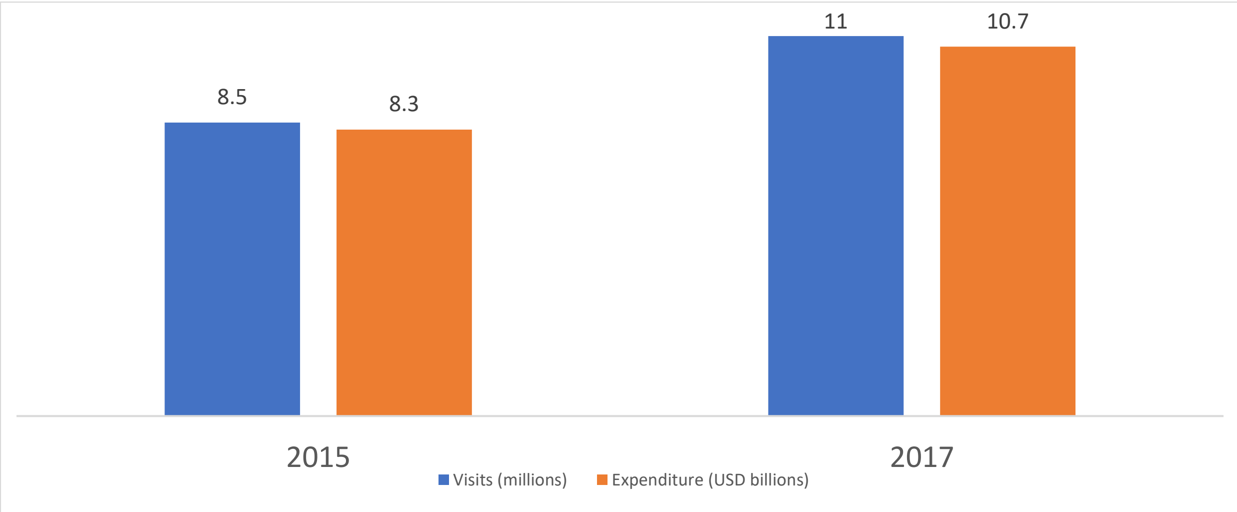
MENA WELLNESS TOURISM

THE MENA WELLNESS TOURISM INDUSTRY

As it stands, MENA wellness tourism seems to be in its infancy. It is primarily dominated by the UAE spa retreat sector, the Israeli Dead Sea spas and medical centers and the thermal/ mineral springs of North Africa.

Globally, there has been a surge in terms of embracing what is termed the Mediterranean diet, which is high good fats, greens, pulses, ancient grains and small quantities of meats, however, the region itself has yet to exploit this perception.

Other than that, the development of a wellness offering in the region is a white space that for the most part remains unoccupied, with Dubai mainly focusing on being more of a luxury destination than a wellness one.



*The region is experiencing twice the growth of the global industry at 14% per annum.
Graph 3: MENA Wellness economy
Source: Global Wellness Institute

Despite being in its infancy, the region seems to experience strong growth in this sector. Anecdotally, the key drivers of this growth seem to be as follows:

- The global wellness orientation is having an impact on the region both in terms of inbound travelers as well as raising consciousness to wellness among regional domestic and inter-regional markets.
- Rising healthcare costs is driving some governments in the region to both promote and look for more preventative care-oriented solutions, most of which are within the wellness space. This is particularly true in the GCC as a whole.
- The significant growth in the fitness industry is also driving growth in the overall wellness sector. Saudi and the UAE in particular have seen a boom in the fitness industry over the last 5 years.

Several Middle East and North Africa region countries promote wellness tourism on their national tourism websites, but mostly and exclusively highlight spas (e.g., Dubai, Abu Dhabi, Qatar, Morocco, and Egypt). Tunisia and Algeria tend to highlight their traditional thermal offerings, while Israel has leveraged the therapeutic properties of the Dead Sea for wellness tourism as well as promoting skincare/cosmetic products. However, thousands of sinkholes have closed down beaches, damaged resorts, and halted developments, highlighting the conflict between fragile natural resources and the tourism and economic development that depends on them.

Additionally, Egypt is beginning to actively develop its regional and historically famous wellness locations, namely, the black sands of the Safaga/ Red sea region, the sand baths and hot spring in the Siwa

Oasis, and sulfur springs in Helwan. These are getting both government support as well as seeking investment for further development.

The Gulf countries which don't have much by way of natural wellness resources are increasingly becoming involved in the sector through developing purpose-built resorts and spas that not only cater to the secondary wellness traveler, but directly target the primary one. Examples of this can be seen in the UAE and Qatar in the form of the recently launched Retreat Palm Dubai and the Zalal Wellness Destination Retreats.

Hotels are also getting in on the action with very direct developments such as Al Shaqab healthy/ active lifestyle concept hotel in Qatar Education city and the launch of the FORM hotels in the UAE focused on wellbeing, lifestyle and technology driven and socially responsible design.

"Health" tourism is a term that is being used increasingly in the region, especially in the GCC as an umbrella for wellness and medical tourism. It's worth highlighting that many of these developments are being housed in socially and environmentally responsible design, blurring the lines between this sector and eco-friendliness.

While the region certainly represents a certain level of competition, it also represents a significant opportunity for growth both from within and from outside the region. This is particularly true for Jordan which has already established a good reputation as a medical tourism destination which it is continuing to develop and invest in.

Top Ten Spa Markets in Middle East-North Africa, 2017

	Number of Spas	Spa Revenues (US$ millions)	Spa Employment
United Arab Emirates	933	$873.1	25,569
Saudi Arabia	510	$347.3	9,298
Morocco	2,107	$294.8	17,366
Israel	520	$281.8	7,424
Bahrain	129	$178.1	2,894
Kuwait	136	$135.0	2,867
Qatar	103	$126.8	2,226
Egypt	608	$125.4	5,399
Oman	105	$125.3	2,237
Tunisia	303	$117.5	4,335

Source: Global Wellness Institute

Top Five Thermal/Mineral Springs Markets in Middle East-North Africa, 2017

	Number of Establishments	Revenues (US$ millions)
Tunisia	126	$189.8
Israel	6	$66.5
Algeria	181	$45.4
Iran	46	$34.3
Morocco	18	$29.6

Source: Global Wellness Institute

Table 1: MENA Spa economy and thermal/ mineral springs market
Source Global Wellness Institute

A COMPETITIVE ANALYSIS

The following table highlights key figures relating to wellness tourism development in the region over the last 4 years and shows real promise if these trends can be sustained through promotion and investment.

	Trips 2015 (millions)	Trips 2017 (millions)	Revenue 2015 (USD millions)	Revenue 2017 (USD millions)	Rev/ visitor 2015	Rev/ Visitor 2017	Growth in Trips (millions)	Growth in revenue (Millions)	Percentage growth in revenue (%age)
UAE	1.7	1.8	2722	3750	1601	2083	0.1	1028	38
Morocco	2.5	2.8	1552	1718	621	614	0.3	166	11
Israel	0.9	0.9	1067	1131	1186	1257	0	64	6
Jordan	0.4	0.5	438	604	1095	1208	0.1	166	38
Saudi Arabia	0.4	0.7	337	492	843	703	0.3	155	46
Tunisia	0.5	0.6	322	314	644	523	0.1	-8	-2
Bahrain	0.3	0.3	312	563	1040	1877	0	251	80
Iran	0.5	0.6	310	388	620	647	0.1	78	25
Egypt	0.4	1.2	307	427	768	356	0.8	120	39
Oman	0.2	0.4	304	473	1520	1183	0.2	169	56
Average	**0.8**	**1.0**	**767**	**986**	**994**	**1045**	**0.2**	**219**	**34**

Table 2: Regional analysis of wellness tourism trends by country
Source: Analysis of data from the Global Wellness Institute

THE GCC

Led by the UAE, and in particular Dubai, the GCC is aggressively seeking to find alternative sources of revenue, and tourism is a sector that seems have been identified as holding much promise. Significant investment has been made and continues to be made in the health tourism sector, and the wellness tourism industry has benefited greatly from that.

The key strength of the GCC is in its ability to seemingly endlessly fund developments. Most of this has gone into purpose-built retreats and resorts, mostly catering for the well to do traveler in the form of high-end spas.

The weakness of that area is mainly the lack of real natural sources of wellness, far fewer outdoor or nature-oriented possibilities, and last but not insignificant a perceived lack of authentic lifestyle experiences, which more and more are becoming important, not only to the wellness traveler but to all travelers seeking a reprieve from their daily grind. In addition to this, the GCC (apart from Saudi Arabia for now), is more and more being perceived as a premium destination, and this is reflected in the per visitor values highlighted in the table above, where the UAE and Bahrain are more than double the regional average, and almost double the next top destination such as Jordan and Israel.

Nonetheless, its key to be mindful of the quick pace of development in that region, as GWI notes:

> *Meanwhile, several countries that do not have an established hot springs industry or tradition are recognizing the value of these natural resources for tourism development. For example, Oman is now promoting its natural springs on its national tourism website. Saudi Arabia is promoting investment in hot springs to establish therapeutic, recreational, and wellness resorts that will attract domestic and regional tourists for both wellness and medical tourism. Even Iraq has recently reopened its historic Hammam al-Alil, a historic hot springs facility that used to receive thousands of wellness and medical tourism visitors prior to the war.*

ISRAEL

Given the proximity and shared resource of the Dead Sea, it is key to consider the competitive landscape that Israel poses, especially in terms of European, North American and Asia-Pacific tourists considering the region (of course, and for now, there is no competition for Arab tourists from the region).

Israel has certainly leveraged the Dead Sea both as a destination and in terms of product development with both resorts and brands getting significant investment and support from the government and global 'cultural' connections. Whilst not definite, anecdotal evidence points to Israel's dead sea product industry standing at, at least ten times that of Jordan and commanding a significant premium. There has also been significant insurance and inter-government agreements seem to be in place to ensure a constant flow of wellness/ medical tourists to Israeli dead sea resorts for short- and long-term treatments.

That said, Israel does have several disadvantages that present opportunities. There seems to be significantly more erosion and sinkholes developing on the Israeli side of the Dead Sea, and that seems to have contributed to a slow-down in growth of its Wellness tourism sector.

In addition to this, a lot of the growth of their Dead Sea product sector has come due to the lack of awareness of the Jordanian counterparts which are of equal quality and at lower premiums. And Last and again not least, Jordan is less of a controversial destination, especially for European travelers, and while its impacted by regional instability, this is to significantly lesser degree than Israel that tends to be more directly involved in this instability.

NORTH AFRICA

The most direct competitor in North Africa is Egypt, which is also building a 'health' tourism sector and both seeking and investing in their wellness offering. Additionally, The Global Wellness Institute notes:

> *"Tunisia and Algeria have the region's most established thermal bathing and thalassotherapy sectors, rooted in the French tradition of "thermalisme." In recent years, many formerly medical-oriented thermal centers have been adding complementary spa treatments, recreational options, lodging, and other offerings to attract wellness tourists. Governments in both countries have long supported the therapeutic and medical use of thermal/mineral/sea waters, and both countries have national tourism strategies that leverage thermal resources for diversification and growth. Several major projects are underway throughout Tunisia, where there are plans to privatize some of the historic thermal centers and build 54 new ones by 2020. There are many new developments in Algeria, where 70 springs have been granted to private investors, 13 new private facilities have opened, and $100 million is being invested to modernize eight publicly-owned thermal centers and 40 traditional thermal hammams. Both countries are also raising quality standards through workforce training (Algeria) and new ISO certification for thalassotherapy facilities (Tunisia)."*

That said, these countries have their own set of challenges in terms of stability, attracting investment and pushing past their legacy of simply being affordable beach resort destinations.

There is no question that the region is buzzing with activity oriented at exploiting the wellness tourism opportunity, and it is becoming more clearly defined and separated from its cousin the medical tourism industry. Each country faces its own sets of challenges and opportunities; however, few are as well situated to take advantage of this sector as Jordan is.

WELLNESS TOURISM IN JORDAN

DEFINING THE WELLNESS TOURISM SPECIFICALLY FOR JORDAN

A national strategy for wellness tourism that takes advantage of the aggregated efforts of both the government and private sector and seeks to garner both short- and long-term investment cannot be developed without first clearly defining the opportunity and bringing everyone on the same page in this regard. One of the main findings of this assessment, and invariably a key challenge and opportunity is the lack of definition of what wellness tourism represents for Jordan, and the inevitable conflation with medical tourism.

The title of this report is more than marketing hyperbole in the case of Jordan, because wellness is quite literally in the nature of the country. This manifests in the Dead Sea, the thermal/ mineral springs, the general temperate climate, the unspoiled and underdeveloped natural treasures of the Wadis, hills, seaside, the adopted Mediterranean foods, the herbal richness, not least of which being the thyme, and of course it goes without saying the quality of the olive oil. Maybe secondary, however, still important, is that this is framed in the context of a scientifically robust culture, with a well-earned positive reputation in the medical industry, regional manufacturing and a wealth of regionally oriented technology start-ups that have attained world class success.

With this in mind, wellness tourism in Jordan can be defined the promotion of non-medical treatments, activities and a lifestyle that is conducive to better state of wellbeing. These can relate to specific ailments or for the general purpose of feeling good about one's body, mind and spirit.
Examples of this are as follows:

- ***Dead Sea spa treatments for skin, mental health and other similar conditions.***
- ***Retreats for self-development, mindfulness, etc.***
- ***Partaking in community development activities such as farming, cooking, environmental etc.***
- ***The use of natural treatments for health maintenance and treatment of minor ailments.***

It is important to also highlight, that this is in line with the expectations of a new generation of travelers that put their wellbeing high on the list of criteria for choosing a destination.

The bottom line being that every aspect of Jordan's nature can and should be defined in a way that demonstrates its connection to wellness. In this context, it is equally important to clearly separate wellness from the medical tourism sector, as well as exploit the areas where there could be some overlap:

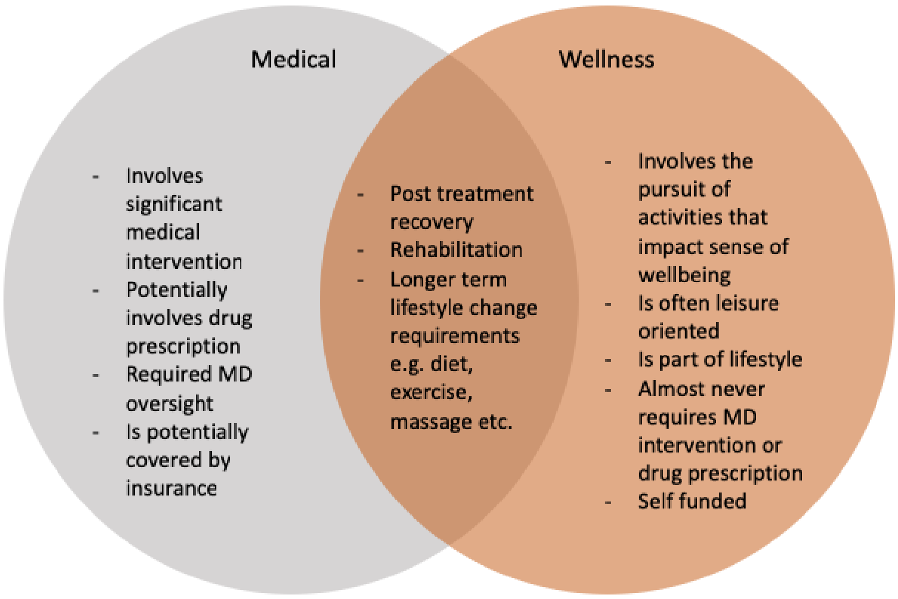


Figure 4: Overlap and difference between Medical and Wellness Tourism

This report addresses in detail what this definition means for Jordan, and specifically outlines the opportunities. A brief overview of the 3 key areas can be summed up as follows:

1. Infrastructure based wellness, principally the Dead Sea, spas and thermal springs/ bath.
2. Wellness as a complimentary addition to general tourism activities as a means of attracting new tourists as well as increasing the value of existing visitors.
3. Lastly, the potential longer-term opportunity of wellness as part of medical tourism, focussing on aiding recovery as a bridge from any medical procedures.

JORDAN WELLNESS TOURISM, NUMERICAL INSIGHTS

While much of the wellness data for the region and Jordan is sparse, and based mainly on estimates, the context allows for some level of analysis and insight that is useful for both assessment and planning purposes. For this reason, the best way to use this information is less in terms of absolutes and more as relative advantages, disadvantages as well as challenges and opportunities.

At the overall level, it is key to note that Jordan's wellness tourism sector seems to sit at slightly above the regional average of top 10 markets in terms of value per visitor. This seems like a good starting point, as it means that it will be perceived as better value for money than say the UAE or Qatar, however, the pricing supports a perception of good quality offering and not the lower end of the market or a 'cheap getaway'.

That's not to say that more value cannot be derived from visitors, according to the International Jordan Tourism Visitor Survey, the average spend was approx.. USD 1178, which is in line with the average wellness tourism spend in Jordan, however globally it is noted that International Wellness travelers on average spend 59% more than the average visitor, this means there is approximately USD 500 more that can be achieved on a per wellness tourist basis.

	Trips 2015 (millions)	Trips 2017 (millions)	Revenue 2015 (USD millions)	Revenue 2017 (USD millions)	Rev/ visitor 2015	Rev/ Visitor 2017	Growth in Trips (millions)	Growth in revenue (Millions)	Percentage growth in revenue (%)
Jordan	0.4	0.5	438	604	1095	1208	0.1	166	38
Regional Top 10 Average	**0.8**	**1.0**	**767**	**986**	**994**	**1045**	**0.2**	**219**	**34**

Table 3: Jordan Wellness Tourism in comparison to regional average
Source: Global Wellness Institute

This also highlights the requirement to grow the total number of wellness-oriented arrivals, which are well below the regional average in both absolute terms and relative to population. This is a function of awareness and generating top of mind associations.

Even though the natural resources would seem to indicate otherwise, looking at the spa economy specifically, Jordan does not feature in the regional top 10 destinations, having been surpassed by most of the regional competitors. The spa economy is key aspect of wellness tourism and positioning and one that is also growing at a fairly rapid pace, as demonstrated by the regional industry.

Top Ten Spa Markets in Middle East-North Africa, 2017

	Number of Spas	Spa Revenues (US$ millions)	Spa Employment
United Arab Emirates	933	$873.1	25,569
Saudi Arabia	510	$347.3	9,298
Morocco	2,107	$294.8	17,366
Israel	520	$281.8	7,424
Bahrain	129	$178.1	2,894
Kuwait	136	$135.0	2,867
Qatar	103	$126.8	2,226
Egypt	608	$125.4	5,399
Oman	105	$125.3	2,237
Tunisia	303	$117.5	4,335

Source: Global Wellness Institute

Table 4: MENA Spa economy
Source: Global Wellness Institute

The thermal/ mineral spring market is another key aspect of wellness tourism, and this too is both underdeveloped in Jordan and has had no growth over the last decade. As pointed out recently, it is an area that several regional competitors are exploiting or looking to develop, and one that the natural resources available to Jordan would indicate should definitely be considered an opportunity creator.

Top Five Thermal/Mineral Springs Markets in Middle East-North Africa, 2017

	Number of Establishments	Revenues (US$ millions)
Tunisia	126	$189.8
Israel	6	$66.5
Algeria	181	$45.4
Iran	46	$34.3
Morocco	18	$29.6

Source: Global Wellness Institute

Table 5: MENA Thermal/ Mineral Spring Industry
Source: Global Wellness Institute

The last time Jordan featured in this list was in 2013 and was listed as having 4 establishments generating a total of USD 15 million dollars. This assessment would indicate that these are less active today than they were then, particularly Ma'In Hot Springs which is the most developed destination of this kind in Jordan and possesses the added benefit of being close to the Dead Sea as well as being within reasonable range of the capital and the airport.

An evaluation of the Israeli model seems to be a useful way forward given their ability to generate the most revenue per location vis-à-vis other countries in the region as well as seemingly having a similar overall wellness tourism value structure to Jordan.

Avg Revenue per location USD	Data from 2017
1,506,349	Tunisia
11,083,333	Israel
250,828	Algeria
745,652	Iran
1,644,444	Morocco
3,750,000	Jordan (2013)

Table 6: Thermal/ Mineral Springs Industr
Source: Global Wellness Institute

There is no doubt that these are key opportunity areas and will likely contribute to the wellness and nature narrative for Jordan. In addition to being available, Jordan possesses several advantages over neighboring markets that a wellness strategy will need to exploit.

KEY DRIVERS OF THE JORDANIAN WELLNESS TOURISM INDUSTRY

In assessing the wellness tourism opportunity in Jordan, particularly in terms of readiness and availability as key criteria, the following were identified as potential building blocks for the sector.

Figure 2: The drivers of wellness tourism in Jordan with the greatest potential

1. Significant consensus exists that the core of a unique wellness proposition for Jordan is the Dead Sea, with a significant upside in terms of tourism potential:
   - Existing infrastructure (particularly the private sector) is generally underutilized, so growth within existing framework is viable. Feedback from operators say that there is approximately 15% utilization of premises.
   - Awareness and understanding of the benefits of the area require development both domestically and internationally. Basic knowledge and awareness of the oxygen levels, the Bromide levels, the UVB rays, the actual minerals in the water and mud are all quite low, both domestically and internationally.
   - The further development and promotion of dead sea products domestically, regionally and internationally. There exists the potential for several more brands at different positioning points (both in terms of value as well as remedial benefits) as well as the promotion of existing brands and portfolio extensions (especially those including other Jordanian natural ingredients)
   - Development of secondary activities and/or programing is required if length of stay is to be increased. There are investment opportunities to develop the areas in and around the hotel spas

at the dead sea. This need not be significant investment in major infrastructure in the short term, however, an assessment of suitable activities and destinations needs to be studied further to create an engaging visitor journey.

2. Another key and obvious element are the natural thermal/ mineral springs. While these are likely to require more short-term development than the Dead Sea, existing infrastructure can still be exploited, and their existence can be a part of the overall wellness narrative that is weaved for Jordan. Some investment opportunities are included in the following section.

3. Wellness as an addendum to eco, adventure, culinary and spiritual/ religious tourism is also a key area of development for which a strategy needs to be evolved, all of which will relate to the natural setting, ingredients and conditions that Jordan has to offer international and domestic travelers.

4. The development of domestic wellness tourism is a low hanging opportunity that ties very well into a local preventative health strategy. Essentially, this can be a key driver of domestic tourism, encouraging the local population to visit and engage in wellness benefits the country has to offer. Additionally, refer to Appendix 1 for activities and investment opportunities related to affordable wellness activities.

5. The existing medical tourism industry can be a significant source of wellness tourism revenue if a framework of collaboration and cooperation can be established between the government, the medical community, the retreat operators and the medical tour operators, generating revenue for all 4 segments. [2]

Together these drivers start to tell the story of Jordan as a wellness destination where wellness is in its nature. Today, the idea of wellness being in the nature is quite literal, as the narrative develops, the hope is that it becomes second nature to those involved in the development of the sector and all the various aspects of society that it touches.

THE OPPORTUNITIES

In this section, the report will highlight what the short, medium- and long-term opportunities are for each of the drivers outlined in the previous section. The key criteria that will be used in assessing the opportunities are as follows:

1. Availability of infrastructure and resources
2. Readiness for delivery of product and services (including skill availability)
3. Investment requirements
4. Credibility within the narrative of wellness
5. Authenticity of the product/ service or experience

The one element that can be done with immediate effect and works across all drivers is the development of a digital wellness strategy for Jordan. This can include, but isn't limited to:

- An interactive webpage highlighting all the key areas of wellness in Jordan that should be part of all websites private and government that advocate tourism (the more places it is in, the stronger the association that Jordan will have with wellness, both in terms of SEO as well as actual perception)
- Complimentary social media accounts that derive their content from this page, and continue to narrate on an ongoing basis the wellness benefits of Jordan as a destination
- Domestic and International orientation for these platforms is required when it comes to their promotion. A cohesive positioning and narrative is also key.

[2] Medical tourism is being highlighted in the context of Wellness tourism as a potential long-term opportunity to consider once the strategy for wellness tourism is established.

THE 5 DRIVERS DETAILED

THE DEAD SEA

a) **Short term opportunities:**
   i) Advertising & Promotion: Building awareness of the existence of the Dead Sea destinations in Jordan.
   ii) Advertising & Promotion: Building awareness of the wellness benefits of the Dead Sea, both in terms of the conditions surrounding it and the resources derived from it.
   iii) Training and development for Spa employees to sell the spa services.
   iv) The development of pop-up events celebrating the area and its benefits.
   v) The assistance of the Dead Sea medical center in securing international agreements with governments and insurers for the treatment of indicated ailments that they treat, as well as potentially coordinating with other spas to increase the current capacity for the center. That said, the center needs to build capacity in order to support growth, not just in terms of infrastructure but also in terms of qualified providers (doctors and support staff).

b) **Medium term opportunities:**
   i) The development of more treatment-oriented centers along the Dead Sea.
   ii) The creation of packages that combine Dead Sea treatments with Thermal/ Mineral Springs for a holistic spa experience – this will be unique to Jordan in terms of competitive set.
   iii) Development of a more holistic wellness approach across the visitor journey to include culinary products, fitness-oriented activities, local herbal and natural remedies, creative activities, custom meditation and yoga programs etc.

c) **Long term opportunities:**
   i) The development of more spas resorts and day spas along the Dead Sea
   ii) The development of the area in a sustainable manner in order to create a more engagement with the place rather than it being a pit stop.

THE NATURAL THERMAL/ MINERAL SPRINGS

d) **Short term opportunities:**
   i) Advertising & Promotion: Building awareness of the existence of this resource.
   ii) Advertising & Promotion: Building awareness of the wellness benefits of this resource.
   iii) Developing domestic interest in the revitalization of this resource.
   iv) Building a strategy for the relaunch of existing infrastructure.

e) **Medium- to long-term opportunities**
   i) Sector revitalization through investment in the development of more destinations with facilities
   ii) The development of public springs facilities
   iii) The development of female only facilities to cater to the region’s cultural sensitivities
   iv) The development of a domestic thermal/ mineral springs culture akin to Northern/ Eastern Europe and the Far East (name Japan).

WELLNESS TOURISM AS A COMPONENT OF ECO/ ADVENTURE/ SPIRITUAL & CULINARY TOURISM

f) **Short-term opportunities:**
   i) Training and development of human resources in the sector to cross-sell wellness destinations as well as develop and understanding of their benefits.
   ii) The development of wellness inclusive packages that are catered to the principal activity engaged in (e.g. mud bath at desert camps).
   iii) The development and distribution of wellness-oriented information guides that can be given to tourists engaged in other activities.
   iv) The development and promotion of wellness oriented culinary and beverage options that speak of Jordan and off wellness

g) Medium to long-term opportunities:

i) The development of wellness retreats at various sites geared towards activities such as ecotourism, adventure or spiritual journeys.
ii) Further development and investment in domestic organic produce and products.
iii) The development and investment in brands that create Jordanian influenced wellness products that can be upsold to tourists and the domestic market.
iv) The development of a technology gamification platform (potentially an app) that rewards partaking in wellness-oriented activities for both visitors and the domestic market.

DOMESTIC WELLNESS TOURISM

h) Short-term opportunities:

i) Advertising & Promotion: Building awareness of the wellness benefits of the Dead Sea and the thermal/ mineral springs.
ii) Start to build these resources into the mainstream national identity and culture and define a practice around them.
iii) Potentially create a 'domestic rate' for the use of various wellness-oriented resources to encourage their use.

i) Medium to long-term opportunities:

i) The development of public Dead Sea and springs facilities
ii) The development of female only facilities to cater to the region's cultural sensitivities
iii) The development of a domestic Dead Sea and thermal/ mineral springs culture akin to Northern/ Eastern Europe and the Far East (name Japan).

MEDICAL TOURISM INDUSTRY[3]

j) Short-term opportunities:

i) The development of a body that coordinates between all the key stakeholders across the spa, medical and tourism operators in order to understand the requirements and develop packages that can be prescribed to potential patients.
ii) Training and development in the understanding of the use of natural resources and spas in aiding the recovery of patients from various medical interventions.
iii) Development of incentive packages for medical professionals to engage in the prescription of naturally aided recovery programs.

k) Medium and long-term opportunities:

i) Conducting scientific studies on the benefits of recovery in areas such as the Dead Sea and natural mineral/ thermal springs
ii) Investment for the development of all-inclusive infrastructure at or near various natural locations (not just the Dead Sea and the springs, but to include other restive areas, even potentially some of the Wadis).

[3] This is potentially a longer-term consideration, it's been highlighted in this report to demonstrate the potentiality of the sector cross-over

GLOBAL TRENDS TO CONSIDER IN JORDAN

Here are some key global trends that should be considered for adoption in Jordan as part of a wellness tourism strategy:

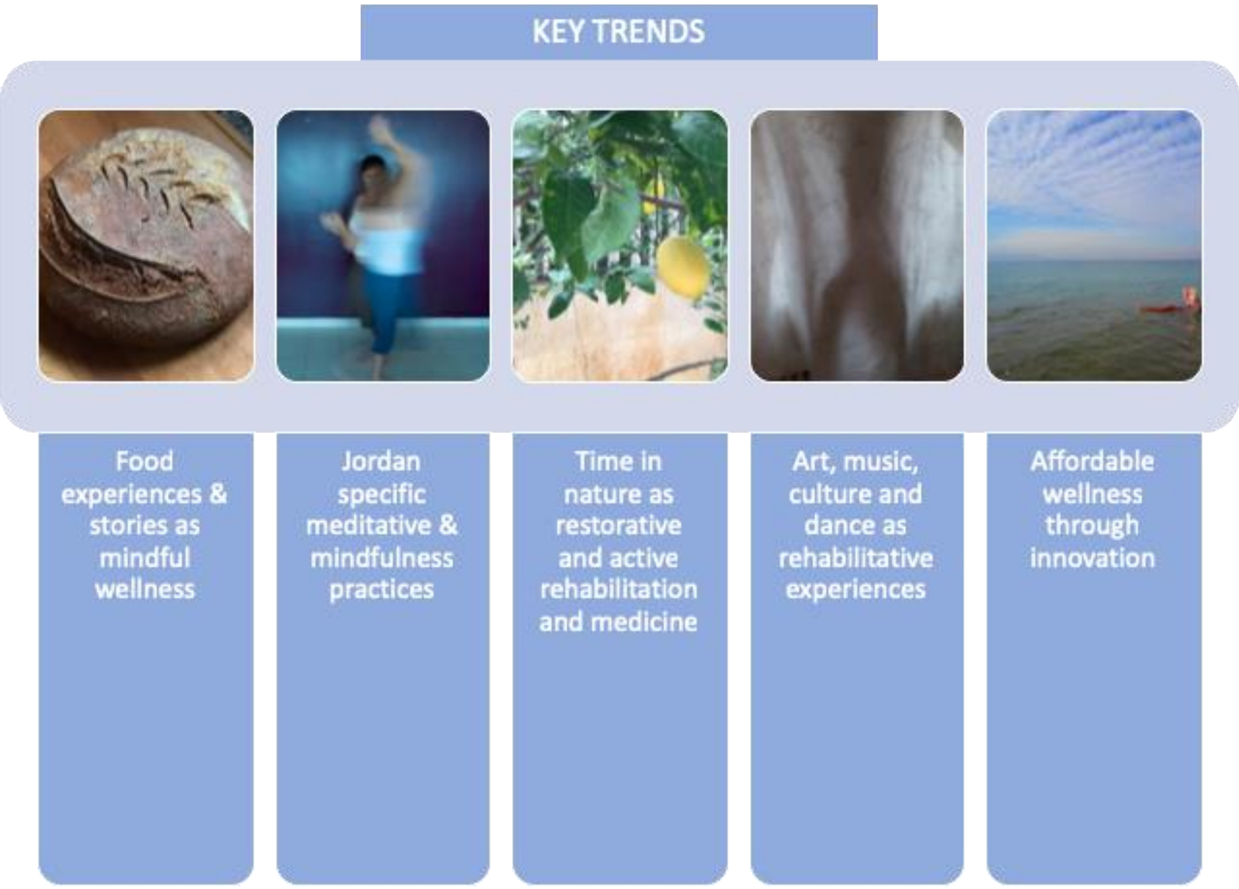


Figure 3: Global trends in the wellness tourism sector that can be adapted in Jordan

1. Food experiences & stories: Given the Mediterranean diet is having its moment, and Jordan is rich in key ingredients of this diet (e.g. herbs, olives and olive oil, fermented products etc.) and there is an interest among tourist to not just eat but to experience the food and understand its origins and the people who produce and prepare it, this is an opportunity to deliver to tourist experiences unique to Jordan that will be seen as contributing to their wellbeing.
2. Jordan specific meditative and mindfulness practices: Other than having a wide array of locations that are unique and at which tourists can partake in these practices, there is an opportunity to use local and international experts to develop these further, so they take into account local customs and the nature of the locations to deliver really unique experiences.
3. Time in nature as restorative and active rehabilitation: In coordination with the RSCN and as way to promote its activities and locations, nature related wellness activities are a great way to promote wellness tourism as well as driving revenue opportunities.
4. Art, music, culture and dance as rehabilitative experiences: More and more these aspects of life are seen (even by the medical community) as a means of providing not only balance, but health and wellness to people’s life. Ensuring they are part of the tourist agenda and curating them in the context of wellness becomes an opportunity to also deliver on tourism revenues.
5. Affordable wellness through innovation: Appendix 1 lists a variety of activities and products that can be delivered in an affordable way to wider audience (vis-à-vis high-end resorts and spas as an example). Working along with technology businesses (as an example a wellness-oriented version of AlTibbi.com) to deliver information and best practice for wellness orientation.

WELLNESS TOURISM OVERSIGHT REQUIREMENTS

STRATEGY, MANDATE AND IMPLEMENTATION

While a significant portion if not the majority of work and investment required to develop this sector and deliver on its requirements are likely to come from the private sector both domestically and potentially through foreign investment, building the mandate for a strategy and its implementation will require centralized oversight and coordination to get things going.

This is currently a secondary mandate for the JTB department currently managing medical tourism. If the overall strategy is to evolve this to become Health Tourism with two components of medical and wellness, it is highly recommended that wellness is given the attention it requires to guide it through its infancy and enable it to fulfill its potential.

This means having the resources available in the form of a team that will manage through the process of building a strategy and creating the mandate for its implementation, and then overseeing and coordinating the key stakeholders required in order for this to be a success.

In addition to developing a strategy for wellness tourism, this department will need to develop and deliver the following:

- Key performance indicators that can be tracked in order to ensure objectives are being met
- The development of and enforcement of standards across the sector (or the implementation of already established standards from international bodies etc.)

CONCLUSIONS AND NEXT STEPS

KEY CONCLUSIONS

- Creating a team that will drive this sector independent of medical tourism is key to its success. Given the involvement of JTB and USAID to date in this project, and a growth of understanding of it, a team led from within JTB is the most likely to drive the project forward. This team would need to be comprised of the following skill sets:
    - Project management for coordination with key stakeholders and seeking investment.
    - Marketing (with a skillset in the use of digital media for marketing).
    - A wellness specialist that keep abreast of development and advise all stakeholders.
    -
- Garnering support and acceptance of the definition of wellness outlined here will be key to any next step in this process. The key stakeholders that would need to be brought along are as follows:
    - JTB and the Ministry of Tourism.
    - The private sector involved in the marketing and delivery of Wellness tourism products.
    - Potential investors (private and institutional).
- In moving forward with this project, the following areas of information will likely need to be addressed:
    - Including a wellness section in the tourism survey as a means of assessing the potential and gauging key areas of interest.
    - A numerical audit of the available products and services available.
    - A global scan of marketing activities to determine a suitable brand positioning (could be followed by a concept evaluation if budget allows).
    - A review of current digital assets with a view to see best fit for the wellness category.
    - A financial review of current tourism budget and revenue in order to project potential earnings.
- Given the climate, the broad array of wellbeing-oriented activities, locations, food culture and easily recognizable authenticity, Jordan has a lot of credentials to support the development of a wellness tourism strategy.
- Prioritizing short term opportunities will likely galvanize the sector and show quick returns.
- Focussing on the ‘natural’ aspects of wellness will give Jordan a unique positioning, particularly as it pertains to the region.

- Combining the benefits of the Dead Sea benefits with other wellness activities, products and services will also serve to make this a unique proposition.
- Building awareness and knowledge has to be a key component of any strategy moving forward.
- There are 2 main areas of wellness tourism that Jordan can focus on in the short- to medium-term:
    - Infrastructure based wellness, principally the Dead Sea, spas and thermal springs/ bath.
    - Wellness as a complimentary addition to general tourism activities as a means of attracting new tourists as well as increasing the value of existing visitors.
- In terms of building a strategy these are the drivers that will need development:
    - THE DEAD SEA SPA ECONOMY
    - NATURAL THERMAL/ MINERAL SPRINGS
    - ADDING VALUE TO ECO/ ADVENTURE/ SPIRITUAL/ CULINARY BY ADDING WELLNESS ACTIVITIES AND PRODUCTS
    - DOMESTIC WELLNESS TOURISM NOT ONLY SERVES AS A MEANS TO DRIVE TOURISM REVENUES, BUT ALSO AS A WAY TO PROMOTE DOMESTIC WELLNESS IN GENERAL.
    - NATURAL REHABILITATION FROM MEDICAL PROCEDURES[4]

NEXT STEPS

The next step in the development of a wellness tourism plan for Jordan will be setting out a strategy that allows a progressive roll-out of both short- and long-term implementable steps. The key components for this strategy that need to be developed, can be outlined as below:

1. Short-term development:
   a) Setting out roles of JTB and MoTA and outlining expectations from private sector in order to capitalize on:
      i) The Dead Sea as a wellness destination
      ii) The development of thermal and mineral springs as viable wellness destinations
      iii) The development of value-added wellness products and services
      iv) The promotion of wellness services to domestic tourists
   b) Prioritizing short term opportunities, the key criteria are as follows:
      i) Provide demonstrable returns
      ii) Contribute to the positioning of Jordan as a wellness destination
   c) Developing an awareness campaign to promote the above-mentioned activities and destinations.
   d) Setting out recommendations to key private sector stakeholders in terms of taking advantage of wellness tourism opportunities (e.g. training and development in selling of spa treatments, wellness product preparations in hospitality sector etc.)
   e) Putting Jordan on the Wellness map through participation in key wellness events (see Appendix 2).

2. Medium- and long-term development:
   a) Prioritizing investment opportunities and assessing their value.
   b) Putting in place a team with a medium to long term focus on pursuing these opportunities.

[4] Medical tourism is being highlighted in the context of Wellness tourism as a potential long-term opportunity to consider once the strategy for wellness tourism is established.

APPENDIX 1: ACTIVITIES AND INVESTMENT OPPORTUNITIES RELATED TO WELLNESS

Specific list of Wellness related products and services. This isn't meant to be an exhaustive list, but to serve as an example, and contains some of the latest trends, and curated to be replicable in Jordan.

Automated spa treatments	Food & Beverage	Meditation & mindfullness
Cryotherapy	Fermented food & beverages	Music Therapy
Pulse Electro Magnetic Field Therapy	Incorporation of super food ingredients in local dishes	Art Therapy
Flotation Therapy	Cold press juices & mocktails for health	Local craft skills
Sleeping Pods	Herb based hot and cold infusions	Meditation micro-dosing (frequent short meditations)
Breathing pods	Sprouted seeds as ingredient replacement	Objectives specific meditation
Energy Lounges	Cacao drinks for energy and spirituality	Nature gazing as meditation with music
FAR-Infrared Sauna	Gourmet salts & spices	Rhythmic dance as mindfulness practice
Water Massage	Slow cooked foods	Wellness parties
Lymphatic Bed massage	Natural energy drink shots	
Solariums for natural light	Cold brewed coffee and tea	
Products		
Sleep patches - wearable		
Digital sleep aids		
Scent diffusers for aroma therapy		
Charcoal based oral hygiene		
Natural and non-toxic Meditation mats		
Natural and non-toxic Yoga mats		
Natural and non-toxic prayer mats		
Natural, locally crafted mindfulness journals		
Energizing rocks & crystals		

APPENDIX 2

List of wellness organizations and accreditation options:

GLOBAL WELLNESS INSTITUTE™
EMPOWERING WELLNESS WORLDWIDE

Website: https://globalwellnessinstitute.org/

Description:
The Global Wellness Institute (GWI) is a 501(c)(3) non-profit organization with a mission to empower wellness worldwide by educating the public and private sectors about preventative health and wellness. GWI's research, programs and initiatives have been instrumental in the growth of the USD $3.7 trillion wellness economy—and in uniting the health and wellness industries.
Through its five drivers—**Research**, Initiatives**, Roundtable Discussions,** wellnessevidence.com and **The Wellness Moonshot**: A World Free of Preventable Disease—the GWI informs and connects key stakeholders capable of impacting the overall wellbeing of our planet and its citizens. The GWI makes all of its valuable information and resources available at no cost, which allows anyone, anywhere, access.

WellSpoken.

Website: https://wearewellspoken.com/

Description:
The WellSpoken certification aims to address and counter the pseudoscience that has become commonplace in the wellness industry. Our independent research shows that consumers are becoming increasingly doubtful of the validity of the claims made by wellness brands and ambassadors. It shouldn't be so complicated for them.
If the wellness industry wants to thrive, it needs to change. Standards must improve. It has never been so important for wellness brands to demonstrate a meaningful commitment towards providing the public with authentic content.

GLOBAL WELLNESS SUMMIT
JOINING TOGETHER. SHAPING THE FUTURE.

Website: https://www.globalwellnesssummit.com/

Description:

The Global Wellness Summit (GWS) is an invitation-only international gathering that brings together leaders and visionaries to positively impact and shape the future of the dynamic $4.2 trillion global wellness economy. At each annual Summit, delegates are challenged to look at the way business is done and to create new, collaborative models for the future. We accomplish this by establishing a high-level dialogue among the decision-makers in attendance and by giving delegates the first look at the future of evidence-based wellness and the latest innovations in the industry.